Project Managers' Advisory Group

MINUTES
July 18, 2011

Attending: **(* = by phone)**

Bob Giannuzzi	EPMO
Kathy Bromead	EPMO
Charles Richards	EPMO
Jesus Lopez	EPMO
Gaye Mays	EPMO
Alisa Cutler*	EPMO
Valerie Maat*	EPMO
Janet Stewart	ITS
Sharon Hayes	ITS
Robert Pietras*	ITS
Glenn Poplawski*	ITS
Todd Russ*	ITS
Patsy Thames*	ITS
Nathaniel Hill*	SBOE
Cheryl Ritter*	DOT
Vicky Kumar*	OSC
Mark Massengill*	DHHS DMA
Ellen Zimmerman*	DHHS DPH
Gary Lapio*	DHHS DIRM
Karen Guy*	DHHS DIRM
Lynne Beck*	DMH/DD/SAS
Gary Imes*	DMH/DD/SAS
Larry Sanders*	ESC
Jodi Bone*	ESC
Lloyd Slominsky*	Dept. of Corrections
Colleen McCarthy*	SOS

Bob Giannuzzi welcomed everyone to the meeting. There were no first time attendees.

Bob solicited and received approval of the June minutes.

Jesus Lopez gave special recognition to Sarah Joyner for her extensive service as Scope Management instructor in the PMP Exam Prep program and presented her a congratulatory letter from the SCIO, Jerry Fralick. Sarah is retiring later this month.

Kathy Bromead's file summarizing several IT specific items in the State biennial budget will be distributed with these minutes.

Lynne Beck gave a brief overview of the Microsoft Project User Group (MPUG) and the agenda for its next meeting. Bob included this event in the following upcoming PDU opportunities through NCPMI unless otherwise noted (since updated):

Venue	Speaker	Date/Topic
General Membership	Allen Evitts	July 28 (6:00 PM) 7 Advanced Communication Techniques for Project Managers
Public Sector LIG	Craig Zimmer	Aug 4 (5:45 PM) Program Management - Back to the Basics
PMO Committee		Aug 24 (5:45 PM) TBD
Leadership Committee		No meeting scheduled
Information Systems Committee		No meeting scheduled
Free Webinar (Government CoP)	Christine Cheung	July 20 (noon) The Yin and Yang of Project Management Skills
Free Webinar (Agile CoP)	Jesse Fewell	July 27 (7:00 AM) Agile Contracts
Free Webinar (Agile CoP)	George Schlitz	July 29 (noon) Looking in from the Inside - the View of an Agile Coach
Microsoft Project User Group (MPUG)	Brian Leach	Aug 2 (6:00 PM) Improving the Quality of your Microsoft Project 2010 Schedule

The progress of the EPMO work groups was discussed next.

- **SDLC** to address integration of alternate SDLCs (e.g., Agile) into the current process/workflow. Gaye Mays reported that at the 7/13 meeting , Agile expert, Jose Solera, reviewed and provided feedback on the group's proposed workflow for Agile projects
- **Agency Procurement** to develop a common (within agency) procurement process. Kathy advised that the group is working on the RFP process of evaluation planning and scoring.
- **Business Case** to develop guidelines and provide training on justifying projects based on cost/benefits analysis. Bob reported that the group is still focusing on training material that includes use of the new template.
- **PM Training** to create a project management course for new State PMs and/or part-time PMs. Jesus Lopez advised that this effort is deferred until after the summer.

Alisa Cutler reported on Methodology Task Group activity. The group is continuing the development of a template to itemize and describe project Business Functional Requirements and over the longer term, will address requirement gathering material. Alisa solicited volunteers from currently unrepresented agencies on this team.

Gaye Mays has drafted this year's EPMO customer survey and it is pending SCIO approval. It will be delivered in August.

Over the last several months, the EPMO through its PMAs have noticed that a number of projects were at risk even though their current status reports were assessed as Overall = Green. Kathy advised the group that the EPMO has proposed that a project's known negative factors could result in an Overall assessment of Yellow or Red. This change will be presented at the next monthly CIO meeting. Implementation of this change will require SCIO approval.

Kathy advised that Janet Stewart has been reassigned to the ITS PMO. Her PMA responsibilities have been transferred to Charles Richards.

Charles Richards reported that the next APM training session is scheduled for 7/19. PPM training will resume around September. Training schedules are available on the EPMO website as well as via the ITS Communications Hub.

The June 30 process release information and the EPMO July Newsletter are available at http://www.epmo.scio.nc.gov.

As a best practice, Gaye Mays has sent Bob an interesting Risk Management Plan used on a DHHS project. With the vendor's permission, it will be sent with the minutes for the group's review.

Lessons Learned from recently closed/canceled projects are summarized in the Appendix below.

Meeting adjourned at 3:58 PM.

NEXT MEETING

Monday, August 15, 2011 at 3:30
333 Six Forks Road Conference Room 5 or (919) 981-5581

https://its.ncgovconnect.com/r96139571/

APPENDIX

Lessons Learned Documentation

Exhibit A

DPI - Consolidated Federal Data Collection – CFDC 100

Planning & Design Phase:

Topic	Lessons Learned
1. Staffing Plan	During the execution and build phase the Technology Services restructured the organization. The new organization structure implemented a new division known as the Enterprise Development Team. Project resources assigned to the project became a direct report to the EDT Team. This change caused conflict in priorities for the project resources assigned to develop and support the CFD 100 project. The Portfolio Manager, Resource Managers and the PMO realized that the a organizational change imposed shift in the project scope and schedule became a moving target due to resource availability.
2. Project Schedule / Milestones / Project Planning	The timelines changed often because the EDT Team Manager set the priorities for the resources assigned Lack of standardize AGILE process impacted the project planning, schedule, and milestones. PMO must ensure that the development and communication of. best practices for managing Agile projects are published.
3. ETS System Design Document	Develop standard technical design templates for Agile development. The technical documentation was waived for the project because there was no standard template available for AGILE development. The TASD is required therefore the EDT Team will develop a general TASD for all APEX application..
4. Requirements Mapping	Changes to the waterfall SDLC to AGILE SDLC during the planning phase impacted the delivery of the requirements. Unfortunately, the Functional System Analyst and the project team spent many hours documenting requirements and received customer sign-off. The requirements were grandfathered however, the standard requirements mapping process was eliminated from the scope of work. The AGILE development used prototyping as the standard best practices for requirements gathering which oftentimes conflicted with the signed requirements document.
5. Other	Establish SDL/Agile process and best practices early in the project. The SDLC strategy methodology changed from the Waterfall to the AGILE framework during the project. The AGILE framework was not clearly defined before it became the EDT best practice; therefore the PMO and EDT Manager had to determine the appropriate level of documents required for AGILE development. Many work hours and discussions on documentation consumed the project work. This AGILE process was relatively immature causing conflict during the software development stages of the project.

Execution & Build Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	Milestones dates consistently changed during the project because the resources assigned to the EDT team had other critical priorities. This caused Product Delivery dates to fluctuate impacting our customer satisfaction. CFD 100 project was eventually de-scoped and the EDT team continue product development at a smaller scale.
2. Project Communication	The EDT Manager became the Product Manager and provided the Project Manager development status in a weekly meeting. Timelines and resource availability changed often and the PM was notified once a week during the EDT team meeting of the change. The PM was not allowed to meet with the development resources and dependent solely on the EDT manager to provide weekly status.

Exhibit B

DPI - NC WISE 2008 Hardware Upgrade
Initiation Phase:

Topic	Lessons Learned
1. Level 1 Budget	The budget for the project was not defined before the project started or before the equipment was purchased. Hence the project was significantly off on budget projections. Not having a budget at the start of the project impacted the accuracy of financial reporting.
2. Project Approval Process	The time taken by OSMB and ITS to approve gates too long. Required response times should be established so the approval process does not drag on for weeks.
3. Managing Sponsor Expectations	The project was started without clearly defined expected results. The expected results evolved as the project proceeded. If the broad statement of 'refresh existing hardware' were to be used as the expected results, than yes, the project achieved this. The project met the expectations of the project sponsor and provided value to the business. DPI will need to complete a full school business cycle before this question can be completely answered. To date, yes it has.

Planning & Design Phase:

Topic	Lessons Learned
1. Risk Management	The project risks were properly identified. There were limited DPI resources available to manage the risks.
2. Monthly Status Reporting	Not having a budget at the start of the project impacted the accuracy of financial reporting.
3. Project Schedule / Milestones / Project Planning	The people time estimates for operations was difficult to establish since a previous baseline was not available.

4. Requirements Mapping	Requirements were understood once the project was out from underneath ITS control . This project did not go through a requirements phase. RAC Testing Efforts had No Clear Direction and Were Time-Consuming

Execution & Build Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	Time was over-estimated as anything new technically was seen as a tremendous unknown and feared. It was very difficult to get estimates from team members since a project of this magnitude had not been executed with the current staff.
2. Resource Management (internal & external resources)	I do not believe that the project manager role was clearly understood by the team or was the role given the authority over the assigned team resources. Project teams need to have budget analysts assigned to the project team to do budget work. Technology Services has some to go before we are a 'projectized' organization. The costs from ITS were managed within expectations after negotiating hosting rates. The project was poorly managed in the beginning as no one was truly in control - other than ITS. There were not sufficient DPI resources available to meet project expectations and hence dates slipped to the right. The project was to have dedicated operational resources, however this did not happen. Two key positions resigned during the project and replacements were not available in the necessary time frame. There was not a team member dedicated to internal financials. Not enough operations resources available at DPI. There needs to be a budget analyst on the project team to do the DPI budget and financial tasks.
3. Project Communication	The meetings were to my expectations. Good information was exchanged at the project team meetings. Meeting are an important form of team communications, however, the entire team did not feel that way and complained about having to have meetings. The weekly PM status meeting was not attend by the intended audience (portfolio managers, business owners, project sponsors), hence the meeting evolved into to much DPI project oversight taking place and a meeting soley for the the PMAs. The scheduling of the Financial Review meeting was too unreliable. It seemed to be canceled more times than it was held. Team members came to meetings unprepared to discuss agenda items.

	Team members relied on meeting minutes and did not take their own notes. Team members consistently showed up late for meetings. Team members included the entire team on important email communications. Team members did not always communicate absences to the project manager. Email was relied on very heavily. At times it would have been more appropriate to visit the person and talk in person. Communications from OSBM to the PM did not happen effectively. OSBM communicated to DPI budget and the messages were not clear as to what the request was. Daily Status Meeting were too much. Communication was not clear and consistent.
4. Change Management / Change Request	The DPI and EPMO change procedures were used. OSBM takes too long to review and approve change requests. This impacts the project schedule and PPM reporting. DPI management seemed to ignore information from team members when making critical project direction decisions. The internal process for making technical decisions needs to be documented.
5. Development / Build	Required skills were available. DPI personnel beyond the immediate project team with needed skills and knowledge reprioritized their assigned work to help fix critical project deliverables. Team members were not always able to complete assigned tasks on schedule. Sometimes this was due to skill or knowledge but also due to other steady state work or emergency assignments. Some tasks and deliverables from ITS were late. Not sure if this is related to skill, availability, or poor estimates. Load Testing should have been required
6. Testing (test execution, verification & validation, test scripts, test cases)	Ad hoc and Out of Scope Testing Requests Impeded Testing Progress

Implementation Phase:

Topic	Lessons Learned
1. Project Deliverables (refer to the list of deliverables in the PPM Tool that the PM said would be delivered)	DPI required documentation is excessive. Several required documents need to be established at the agency level and used for all projects. If DPI requires additional documents from the EPMO requirements, DPI needs to identify what problem is being resolved by the document. Reduce the NCDPI required docs!
2. Hosting Provider	Documentation for already in use processes from ITS was not available in a timely manner.

General Comments:

Topic	Lessons Learned
1.	The documentation on the PPBES tool was not sufficient to understand the how to use the tool in conjunction with the requirements of PPM.
2.	In the end, all team members should be very proud of the results. It was long and difficult but it is already producing results.
3.	Team (OPS and QA) cohesiveness and flexibility
4.	The PPBES tool was not used at the start of this project and became a requirement too late in the process.
5.	The user interface to the PPBES tool is not very usable from a PM perspective. The tool was designed for a financial purpose and does not fit well for project use.

Exhibit C

ITS - ESAP Remote Access VPN – Service Introduction and Customer Migration

Implementation Phase:

Topic	Lessons Learned
1. Issue Management	Earlier escalation of Agencies that are not cooperating with the effort is necessary to drive the project to meet it's scheduled completion
2. Monthly Status Reporting	This project should have been one, not two individual projects. The same team members were engaged to complete both efforts. Making it one project would have saved the State money because duplicate effort was performed on the monthly reporting by the PM and EPMO SQA
3. Other	It was more difficult working with the Desktop support team than it was any Agency outside of ITS. They were abrasive, unresponsive and uncooperative with respect to working with the team to deploy DJJDP.

Exhibit D

ITS - Firewall/VPN Service Refresh and Customer Migration

Implementation Phase:

Topic	Lessons Learned
1. Issue Management	Earlier escalation of Agencies that are not cooperating with the effort is necessary to drive the project to meet it's scheduled completion
2. Monthly Status Reporting	This project should have been one, not two individual projects. The same team members were engaged to complete both efforts. Making it one project would have saved the State money because duplicate effort was performed on the monthly reporting by the PM and EPMO SQA
3. Other	It was more difficult working with the Desktop support team than it was any Agency outside of ITS. They were abrasive, unresponsive and uncooperative with respect to working with the team to deploy DJJDP.

Exhibit E

ITS - Web-Presence Look and Feel Updates

Public Site

	Topic Area	Went Well	Area to Improve	Description
1	Testing	x		Using Quality Center during testing helped with efficiency and communication as well as tracking defect information.
2	Staffing	x		Very engaged, dedicated, and knowledgeable staff in every area of the project. Greatly contributed to the success of the project!!
3	Technical		x	embedded links. Issues came up with news in the database, and with quality center reporting.
4	Requirements		x	Had issues with data. Needed representative data (e.g., news items, bill rates) earlier in the process. Should be part of requirements.
5	Design		x	Needed more time to design and do wire frames, and do more analysis of the data requirements for better ways to implement. For example, news items stored in a way that display didn't work; bill rates needed "none" record in the table for the solution we implemented.
6	Change control		x	Requirements changes discussed in meetings weren't always documented, and then we didn't have enough time to design and perform impact assessment for the changes.
7	Requirements		x	Use cases would have been beneficial, especially with testing. As it was, we didn't have any structure for the testing or specific requirements to test to.
8	Testing	x		Problem resolution handled very efficiently and quickly
9	Implementation	x		Production problems discovered were minimal, and all were corrected within a day or two.
10	Quality	x		Final product was well received. Website functioned as designed with very small problems after implementation.

11	Schedule	x		Once the implementation date was determined, the entire project team worked together to meet that date. Despite some of the issues that were discovered within weeks of implementation, and misunderstandings with some of the requirements that had not been documented, the team still met the date and delivered a quality product.
12	Implementation	x		Needed to keep the old service catalog accessible for research. Found a tool, HTTracks, that enabled a local copy of the catalog. Also copied to an intranet URL.
13	Testing	x		SQA, performance, and security testing were included with this project. Ensured that we delivered a quality product.
14	Staffing		x	Early in the project, many delays were caused by staffing turnover.
15	Project Management	x		Helpful in the project with giving direction, setting dates, leading, and driving the process.
16	Planning		x	SQA testing group could have been involved in the process earlier, and given requirements so that they could better plan the testing.
17	Support		x	Now that the website is built, extremely limited resources are available to support the website. Staff reduction over the past 6 months with little or no replacement staff hired will greatly impede the quality of ongoing support.
18	Requirements		x	In the beginning, no requirements had been documented. Met and discussed but not documented. Caused problems with scope and schedule, and change control.
19	Scope		x	After almost a year of work had been done on the project, didn't have a specific charter. Project was not well defined, so was difficult to determine where we were or when it would be finished.
20	Scope		x	Scope of the project changed several times due to technology barriers, staffing changes, and desire to meet schedule. Difficult to manage hitting the moving target.

21	Technical		x	Decision to implement new technology was made without fully knowing the impact to the staff, budget, or the schedule. Once that was determined, decision was made to defer the new WCM technology so that the new website could be implemented more timely.

MyITS

	Topic Area	Went Well	Area to Improve	Description
1	Staffing	x		Very engaged, dedicated, and knowledgeable staff in every area of the project. Greatly contributed to the success of the project!!
2	Testing	x		Problem resolution handled very efficiently and quickly
3	Implementation	x		No production issues!
4	Quality	x		Website functioned as designed. Interfaces with public website are all working correctly.
5	Technical	x		Sync with ebilling users and portal with NCID good idea.
6	Technical	x		integration points with the new technology worked well.
7	Testing	x		SQA, performance, and security testing were included with this project. Ensured that we delivered a quality product.
8	Staffing		x	Early in the project, many delays were caused by staffing turnover on the technical side, both applications development and middleware.
9	Staffing	x		Staff learned new technology very quickly. Staff from the different technical areas communicated well - great teamwork.
10	Support		x	Now that the website is built, extremely limited resources are available to support the website. Staff reduction over the past 6 months with little or no replacement staff hired will greatly impede the quality of ongoing support.
11	Scope		x	Initial scope for the portal was much more robust than what was implemented for this phase. However, we now have the foundation on which to build a solid product in the future.

12	Support	x	When someone left the project, we had a security issue and had to start over partly because IBM could not resolve the problem and partly because we didn't have a trained backup person in place. Support issue still exists.

Exhibit F

DPI - NC WISE eSIS 12.1 Upgrade

Planning & Design Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	Project plans that focus/align with PPM project phases are not effective for driving O&M specific projects. By throwing out the original project plan and developing a new clear/uncluttered plan that ignored phase relationships and focused on specific tasks/dependencies, the project team was able to better understand what was required to achieve and deliver on the project goals. Creating a different QA method (priority/business cycle based) allowed the project to come in on schedule. The standard method would have caused the project to exceed the schedule by 2 months. The above adjustments were absolutely essential as at the point the final PM inherited the project, the schedule was too short based on the amount of remaining work and the resources available.

Execution & Build Phase:

Topic	Lessons Learned
1. Managing Sponsor Expectations	As the sponsor was new, extra care in communicating project status was essential to not spending additional time away from project activities, as this project was on a very short and fast paced schedule.
2. Managing Customer Expectations	Extra care in communicating project status was essential to not spending additional time away from project activities, as this project at the point the final PM engaged was on a very short and fast paced schedule.
3. Project Schedule / Milestones / Project Planning	Creating a new approach for training materials preparation, delivery and presentation allowed the training team to deliver on time, rather than in a delayed/catch-up fashion as has historically been the case.
4. Resource Management (internal & external resources)	Management support of the PM, giving empowerment to control resources (in most cases) was instrumental in the success of the project due to the volume of work coupled with the short schedule and fast paced nature of the project.
5. Vendor Management / Vendor Performance / Vendor Deliverables	Good vendor management/relationship is essential for success in these large upgrade projects.
6. Project Communication	Due to the short schedule and fast paced nature of the project, proactive communication and use of tools like gForge were instrumental to keeping different teams/members in sync. Email confirmation of verbal agreements should be increased to prevent occasional conflicts that can impact progress.
7. Development / Build	Use of post-YET data made the QA process more difficult, as some detail data needed to be created. In the future, the project plan/schedule needs to be aware of the business cyclical impacts from the perspective of data relative to project work.
8. Testing (test execution, verification & validation, test scripts, test cases)	The QA lead and the PM not having complete authority to drive (some) team members to complete tasks added additional risk. Business cycle/data (above) required additional setup work for test cases, extending QA activities.
9. Other	Getting as far in front of agency/ITS processes as possible prevented potential blockages to project progress.

Implementation Phase:

Topic	Lessons Learned
1. Managing Sponsor Expectations	As the sponsor was new, extra care in communicating project status was essential to not spending additional time away from project activities, as this project had evolved to a very short and fast paced schedule.
2. Managing Customer Expectations	Extra care in communicating project status was essential to not spending additional time away from project activities, as this project had evolved to a very short and fast paced schedule. Lead-up webinar approach from the training team went a long way to educate customers as to changes/impacts and managing expectations.
3. Resource Management (internal & external resources)	Management's support of the PM's request to push off a series of staff moves ensured that the project would not be adversely affected during this very critical phase.
4. Vendor Management / Vendor Performance / Vendor Deliverables	Paying the premium to have vendor resources on call during the holiday period was key to the success of this phase, as there were key issues that required vendor engagement at the technical level to keep the project on track for meeting the service back online objectives.
5. Project Cost vs Budget Cost	New hardware positively impacted the project hours during this phase for both internal and external resources. This lesson can be used to better plan future staff resource costs.
6. Production Readiness (software / hardware, process, personnel)	Engaging the service validation team (over and above QA) helped ensure high quality for when services were turned back on for the state-wide customer base, resulting in fewer service desk calls and higher customer satisfaction.
7. Training (user, admin, etc)	The training approach (above) resulted in better informed users and alignment with the project schedule such that training was not operating in catch-up mode.
8. Other	Management tended to let the PM run this show with little interference but was always prepared to add support when requested. This allowed the entire project team to stay focused without distraction (in the vast majority of cases) and helped the various sub-teams to merge as a single supportive team unit, which was foundational to the project's success.